South Coast Planning & Wealth Management LLC

Table of Fees for Services

Carefully read Items 4 & 5 of Form ADV Part 2A for more details on South Coast Planning & Wealth Management LLC's advisory services and fees. Fees below are charged when clients request the services listed. Fees below may not apply to all clients. Fees are negotiable.

Fees Charged by Investment Adviser	Fee Amount	Frequency Fee is Charged	Service(s)
Assets Under Management Fee	$0 - $499,999.99 - 1.20% $500,000 - $2,999,999.99 - 0.95% $3,000,000 - $4,999,999.99 - 0.80% $5,000,000 and Above - 0.65%	quarterly in arrears	Portfolio management for individuals and/or small businesses and high net-worth individuals and bundled Financial Planning Services.
Hourly Fee	$0	N/A	N/A
Subscription Fee	$0	N/A	N/A
Fixed Fee	Not to exceed $10,000 annually	Monthly or Quarterly in arrears	Ongoing Financial Planning Services
	$1,000 - $10,000	Half upfront, half upon completion	Project-Based Financial Planning Service
Commissions to the Adviser	$0	N/A	N/A
Performance-based Fee	$0	N/A	N/A
Other	$0	N/A	N/A
Fees Charged by Third Parties	**Fee Amount**	**Frequency Fee is Charged**	**Services**
Third Party Money Manager Fee	$0	N/A	N/A
Robo-Adviser Fee	$0	N/A	N/A
Fee Total	**Talk with your Adviser about fees and costs applicable to YOU**		

Additional fees and costs to discuss with your Adviser:

Additional Fees/Cost	Yes/No	Paid To
Brokerage Fees	Yes	Charles Schwab
Commissions	Yes	Charles Schwab
Custodian Fees	Yes	Charles Schwab
Mark-Ups	No	N/A
Mutual Fund / ETF Fees & Expenses	Yes	Charles Schwab

Effective July 26, 2023